



# Cost and outreach pilots evaluation

Interim report

July 2019

Learning and Work Institute



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# Executive summary

## Background

The Department for Education (DfE) has developed a programme of Career Learning Pilots to test innovative approaches to lifelong learning and inform the design of the National Retraining Scheme. The Cost and Outreach Pilots are running in five areas, led by the Local Enterprise Partnership (LEP) or Combined Authority: Greater Lincolnshire LEP, Heart of the South West LEP, Stoke and Staffordshire LEP, Leeds City Region LEP, and West Midlands Combined Authority.

Learning and Work Institute (L&W) is working as DfE's development partner on the Cost and Outreach Pilots, providing support on the design, delivery and evaluation of the pilots. This report presents findings from the initial stages of the evaluation, drawing on learner enrolments to subsidised courses in the first quarter of the academic year, a quantitative survey of learners and qualitative interviews with learners.

The overall aim of the pilots was to provide evidence to inform the design of the National Retraining Scheme by testing: which approaches to outreach are most successful at engaging adults in learning; and whether offering a course fee subsidy makes a difference to the uptake of learning.

Given the emphasis on career learning and in-work progression, the aim of the pilots was to engage adults in learning that is "economically valuable" to them and/or the local economy. It was therefore intended that subsidised courses leading to qualifications at Level 3 or above would be aligned to economic priorities, for example growth sectors or occupations, and those that potentially lead to higher wage returns for the individual. To assess the most effective level of subsidy for enrolment, retention and completion, selected courses were subsidised at three levels: 25 per cent, 75 per cent and 100 per cent.

## Key messages

A total of 1,022 enrolments were recorded on subsidised courses up until December 2018. As this data only presents a partial picture of the academic year, (it does not include projected numbers for the full year), additional enrolments are expected to be shown in full year results.

The broad target group for the pilots were working adults with low to medium skills. Just over three quarters (76%) of learners on subsidised courses were working at the time of enrolment. Nearly three fifths (59.2%) of learners were qualified to Level 2 or 3 before starting their course. Just 6.7 per cent held qualifications at Level 1 or

below and 20.9 per cent were qualified at Level 4 or above.<sup>1</sup> Two fifths (40.2%) of learners on subsidised courses were aged 24 to 34 years, with a further third (34.8%) aged 35 to 49. A total of 15.7 per cent of the learners were aged 19-23 and 9.2 per cent were aged 50-64.

### **Learner motivations**

The majority of learners responding to the survey (93%) said they took up learning for work or career reasons. They can be classified into two groups: upskillers who want to progress in their current line of work (for example improve in their current role or get a promotion) (65% of learners motivated by work or career reasons); and retrainers who want to move into a substantially different job (22%).<sup>2</sup> Retrainers were predominantly younger adults wanting to move on from low skilled work, but who lacked visible progression opportunities. Retrainers reported a comparatively high number of barriers to career advancement, including a lack of experience, concerns about childcare and a lack of confidence.

All learners interviewed for the evaluation attributed their participation in the subsidised courses to plans and ambitions regarding their future employment. This included:

- changing the sector or occupation in which they work to establish a new career;
- progressing in their current occupation or profession, either with their existing employer or in a new organisation;
- progressing to management roles.

A number of respondents stated that they were undertaking training in the hope of achieving greater job security, which is particularly relevant to the aims of the NRS.

### **Experiences of outreach and Information, Advice and Guidance (IAG)**

The survey of learners showed that those who were employed were most likely to have heard about learning opportunities from their employer or a learning provider's website (62%).

Similarly, some learners taking part in interviews also said that they heard about training opportunities via their employer. Messages communicated in this way meant that training was implicitly endorsed by the employer and therefore gave additional

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<sup>1</sup> 7.4 per cent of learners did not hold any qualifications at the time of enrolment and the qualification level of 5 per cent of learners was unknown.

<sup>2</sup> The remaining respondents were either unemployed at the time of enrolling and motivated to learn to get a job (9%) or indicated they were motivated by something else (5%).

weight to the message. Interview evidence also confirmed the importance of outreach being perceived by learners as personally relevant, particularly where messages were linked to individuals' professional development plans and career aspirations.

Learners' testimonies suggested that, in most cases where IAG was experienced, this did not take the form of in-depth advice or guidance, but rather signposting and providing practical information about courses. In retrospect, some learners said that they would have welcomed more substantive IAG.

### **Influence of the subsidised course offer**

Administrative data showed that nearly three quarters of learner enrolments to date related to courses that were fully subsidised.

The majority (89%) of survey respondents had been aware of the course fee subsidy at the time of enrolment; one in ten (11%) had not been aware of it. Three quarters of those who were aware of the course fee subsidy suggested that it was a factor in encouraging them to take up the learning opportunity. Learners on fully subsidised courses were more likely to report a positive influence, compared with those on part subsidised courses. However, the survey also suggested that the subsidy had no behavioural influence for one third of the overall cohort, either because they reported that the subsidy did not encourage them to take up their course, or because they were unaware of the subsidy.

Learners taking part in interviews, who were influenced by the offer of a subsidy, explained that the subsidy was the main trigger that tipped the balance in their decision making. Learners who said they weren't influenced by the subsidy reported that the offer had raised the profile of the course in promotional material and therefore brought it to their attention, but the funding itself made no difference to their selection of a course or their decision to enrol.

### **Other learning-related costs**

The learner survey indicated that some upskillers (28%) who were not enrolled on fully subsidised courses received financial support from their employer to cover remaining fees. However, no retrainers received financial support from their employer.

The survey showed that the majority of learners (70%) incurred at least one kind of cost, in addition to course fees. Wider costs associated with learning cited by learners included course books, travel, childcare, administrative fees, and negative impact on earnings as a result of having to take unpaid leave for their course. In general, the evidence suggested that meeting these additional costs presented a



challenge for a small number of respondents, but that overall, learners accepted these costs and in some cases were able to access other sources of support.

## **Implications for the National Retraining Scheme**

Findings from the learner survey and learner interviews highlighted the following implications for the National Retraining Scheme (NRS):

- To successfully engage adults seeking to retrain, the NRS will need to address both barriers related to individuals' attitudes towards career learning, as well as more practical barriers related to individuals' personal circumstances.
- The range of career-related motivations cited by learners illustrates the diversity of messages that need to be conveyed as part of any outreach activity for the NRS. These messages will also need to be tailored to ensure they are engaging for the broad target group.
- Learners responded positively to becoming aware of learning opportunities in the workplace, either implicitly through seeing promotional materials or explicitly through employer encouragement to participate in training. This emphasises the importance of employer engagement in the NRS – not only to support new recruits but also to communicate messages about the scheme and the offer of training to staff.
- Feedback from some learners indicated that they would have welcomed more substantive IAG. This highlights the importance of having a more in-depth IAG offer for people who need it. This offer will need to be clearly communicated to ensure individuals are aware of what they can access, how, and the benefits of doing so.

## Introduction

The UK Government has committed to the creation of a National Retraining Scheme, which will aim to prepare workers for future changes to the economy, including through automation, to retrain into better jobs.

This will help to address challenges to the economy,<sup>3</sup> including: automation and advances in technology that are changing the nature of work; an ageing population and extended working lives; an entrenched productivity gap relative to other advanced economies; and low social mobility by international standards that does not appear to be improving.

Despite the evidence on the benefits of learning,<sup>4</sup> the UK has seen a recent decline in the number of adults participating in learning and skills training.<sup>5</sup> In addition, studies have consistently demonstrated persistent patterns of inequality in participation.<sup>6</sup> Younger adults, people who already have higher level qualifications and those in higher socioeconomic classifications are most likely to be learning; with participation levels declining with age and distance from the labour market, and lowest for those with fewer or no formal qualifications. For the National Retraining Scheme to be effective, these entrenched inequalities in participation in learning need to be addressed. Doing this requires a better understanding of how adults can be successfully engaged in learning.

The Department for Education (DfE) has developed a programme of Career Learning Pilots to test innovative approaches to lifelong learning and inform the design of the National Retraining Scheme. These pilots included the Flexible Learning Fund, to explore a range of flexible delivery methods, and the Cost and Outreach Pilots, to develop the evidence base on how more adults can be engaged and supported in learning. The Cost and Outreach Pilots are running in five areas, led by the Local Enterprise Partnership (LEP)<sup>7</sup> or Combined Authority: Greater Lincolnshire LEP, Heart of the South West LEP, Stoke and Staffordshire LEP, Leeds City Region LEP, and West Midlands Combined Authority.<sup>8</sup>

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<sup>3</sup> Foresight Review into the Future of Skills and Lifelong Learning  
<https://www.gov.uk/government/collections/future-of-skills-and-lifelong-learning>

<sup>4</sup> Ibid

<sup>5</sup> Green, F et al. (2015) "The declining volumes of workers' training in Britain", British Journal of Industrial relations 52(2) pp.422-488

<sup>6</sup> Learning and Work Institute (2018) Adult Participation in Learning Survey 2017  
[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/735438/Participation\\_in\\_Learning\\_Survey\\_2017.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/735438/Participation_in_Learning_Survey_2017.pdf)

<sup>7</sup> There are 38 Local Enterprise Partnerships across England: <https://www.lepnetwork.net/>

<sup>8</sup> The West Midlands Combined Authority covers three LEP areas: Greater Birmingham and Solihull; the Black Country; and Coventry and Warwickshire.

Learning and Work Institute (L&W) is an independent policy, research and development organisation dedicated to lifelong learning, full employment and inclusion. L&W is working as DfE's development partner on the Cost and Outreach Pilots, providing support on the design, delivery and evaluation of the pilots.

This report is the first published interim report of the evaluation of the Cost and Outreach Pilots. The report presents findings from the initial stages of the evaluation. It draws on data on learner enrolments to subsidised courses in the first quarter of the academic year, as well as a quantitative survey of learners and qualitative interviews with learners. The report concludes with consideration of the implications for the design and implementation of the National Retraining Scheme.

## Pilot design

This section provides an overview of the pilot aims and design process, as well as a summary of the approaches planned in each of the pilot areas.

### Pilot aims

The overall aim of the pilots was to provide evidence to inform the design of the National Retraining Scheme by testing:

- what approaches to outreach are most successful at engaging adults in learning
- whether offering a course fee subsidy encourages the uptake of learning.

In light of the aims of the National Retraining Scheme, the broad target group for the pilots were working adults with low to medium skills. Individual pilots were able to focus on more specific target groups, depending on local circumstances and priorities. For example, some pilot areas also included returners to the labour market (e.g. after a break for caring duties).

Given the emphasis on career learning and in-work progression, the aim of the pilots was to engage adults in learning that is “economically valuable” to them and/or the local economy. It was therefore intended that subsidised courses would be aligned to economic priorities, for example growth sectors or occupations, and those that potentially lead to higher wage returns for the individual. All subsidised qualifications would lead to qualifications at Level 3 or above.

To assess the most effective level of subsidy for enrolment, retention and completion, selected courses were subsidised at three levels: 25 per cent, 75 per cent and 100 per cent. The final list of qualifications agreed for subsidy can be found at Appendix 1. While outreach and IAG activity is targeted at particular groups of

adults, the subsidised courses can be accessed by anyone who meets the particular minimum entry requirements for each course.

## **Pilot design process**

Pilot lead organisations designed the pilots in collaboration with a range of stakeholders including learning providers, local authorities, National Careers Service providers, employers, and Unionlearn representatives. This process was supported by DfE and L&W.

The design of outreach involved consideration of the messages to be communicated to potential learners, the method of communication, and the most appropriate messenger. This element of the pilot also included independent and high-quality information, advice and guidance (IAG).

While pilot leads were expected to propose qualifications for subsidy that aligned to local economic priorities, there were some restrictions due to existing funding and quality arrangements that could not be changed within the timescales of the pilot. Qualifications needed to be at Level 3 or above, available on the Advanced Learner Loan catalogue, and deliverable within the 2018/19 academic year. A list of qualifications in scope was shared with pilot leads to support their selection of qualifications.

The Education and Skills Funding Agency (ESFA) reviewed the qualifications proposed in the initial delivery plans and carried out modelling work to ensure the combination of qualifications and subsidies across the pilot areas were affordable and could provide comparability for evaluation. Adjustments made by the ESFA included: scaling back estimated number of learners, based on learning providers' previous performance and capacity; a proportionate redistribution of funding across areas to ensure fairness; and adjusting qualifications to ensure some consistency and comparability across the areas. In April 2018, the ESFA distributed letters to learning providers in each of the pilot areas, notifying them of the pilot, their funding allocation for the relevant subsidised qualifications and asking them to confirm their intention to participate in the pilots.

## **Greater Lincolnshire**

The Greater Lincolnshire pilot was designed to explore the impact of community engagement with working adults, in combination with a flexible IAG offer and an offer of subsidised courses, on the take-up of training in a region where rurality has traditionally had a negative impact on the opportunities for adults to access learning.

Geographically, the pilot aimed to target low-skilled adults in employment in four local authority areas in the eastern, more disadvantaged part of the LEP area (North East Lincolnshire, South Holland, East Lindsey and Boston). Although this area is traditionally associated with lower skilled and lower paid jobs and comparatively lower levels of qualifications, the LEP and partners identified current and growing unmet demand from employers for employees to fill higher skilled and higher paid jobs. All the LEP's priority sectors (Agri Food, Manufacturing, Visitor Economy, Ports and Logistics, Low Carbon, and Healthcare) are found within this area.

Overall, the pilot's proposed approach to messaging was place-based, with communication via a network of local providers and partners. Within this general approach, a differentiated set of messages were developed for use with the target groups in different localities, such as the promotion of sector specific opportunities in the four target areas and that it's "never too late to learn". A range of methods were used such as local press advertisements, social media and face to face and printed methods. Activities were delivered flexibly on Saturdays or out of hours in accessible venues by local organisations which had established links to employers and communities.

## **Heart of the South West**

The Heart of the South West has traditionally faced challenges around adults' transitions from Level 2 to higher qualifications and associated job roles. In addition, the area also combines urban, rural and coastal areas.

The geographical focus of the pilot design was on three sub-areas of the region covered by the LEP: Western Somerset; Northern Devon; and Plymouth and Torbay. The LEP's choice of qualifications related to sectors experiencing high demand in the region: Business Management; Health and Social Care; Construction; and Engineering.

The Heart of the South West delivery plan proposed a strong focus on face-to-face advice in community and workplace settings. A broad social media strategy was planned to run alongside face-to-face activities. The LEP also decided to include childcare and travel subsidies for learners enrolling onto subsidised courses. This would test whether addressing cost-related barriers, beyond those associated with course fees, would make a difference to engagement in learning.

Central to the design of the Heart of the South West pilot was the testing of a work coach model.<sup>9</sup> The work coach model provides holistic and personalised IAG and support, to improve earnings potential and career progression. Activities are designed to enable people to overcome individual barriers to employment, and to gain the skills, experience and qualifications to achieve their career goals. Regular and agreed interventions support and challenge individuals to achieve their goals. The model may include supporting people onto and through courses, but is also likely to include a range of wider labour market interventions including work experience, job tasters and mentoring. It may also include support to address wider challenges, such as travel, childcare, health-related barriers and specific skills gaps.

## **Leeds City Region**

The Leeds City Region pilot aimed to generate a region-wide campaign to engage adults, raise career aspirations and motivation and raise awareness of the opportunities for retraining in the local area. Alongside this general approach, it would target key groups including labour market returners; adults in low-wage, low skill sectors; and those with higher levels of qualification who wished to retrain for work in a different sector. The campaign included a call to action to contact the National Careers Service for individual IAG.

Subsidised qualifications were linked to sectors identified as having greatest economic value to the City Region (Digital, Engineering and Construction), alongside some generic leadership and management qualifications. The pilot also offered a free one-month travel pass to new learners, to see if the provision of a travel subsidy helped to drive up enrolments.

Alongside engagement of individuals, the pilot proposed linking with wider employer-facing activity taking place in the region, to engage employers in low-wage, low skill sectors. Outreach workers located in local authorities across the region would be key to delivery, linking up services at local level.

## **Stoke-on-Trent and Staffordshire**

The Stoke-on-Trent and Staffordshire pilot, led by the LEP, was designed to test approaches to reach adults who may face barriers to further learning: parents returning to work after a break for childcare responsibilities; self-employed people,

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<sup>9</sup> Evidence from the evaluation of wider programmes that include work coach activity suggests that this approach can be effective in supporting both in-work progression and (re)entry to the labour market. For example, DWP (2018) Universal Credit: In-Work Progression Randomised Controlled Trial: Findings from quantitative survey and qualitative research and Green et al (2016) Improving progression from low-paid jobs at city-region level.

particularly those working in trades; and employees in micro/small businesses. The pilot aimed to utilise existing relationships between local services to test the effectiveness of different messages and communication channels to engage each group.

The outreach and marketing campaign included communication of two sets of messages: those that aimed to 'sell' the *benefits* of learning; and those that aimed to break down *barriers* to learning. Two versions of marketing materials were developed, one including the offer of the course fee subsidy, and the other without, to enable the LEP to test the response to each message. Methods of communication included direct email, day time radio, TV advertising, social media and billboards.

For the course fee subsidy, the LEP proposed qualifications linked to hard to fill vacancies in key sectors, including Advanced Manufacturing and Engineering, Digital, Construction; Health and Social Care; and Childcare.

## **West Midlands**

Pilot activities in the West Midlands were designed to test how adults and employers can best be engaged and encouraged to invest in learning within key sectors. Construction, Engineering, Business and Professional Services and Digital were chosen as priority sectors due to projected growth in labour demand.

The outreach and IAG activities focused on the following target groups: residents in low skills and/or low-income areas; employed adults who wished to develop skills in the priority sectors; and Universal Credit claimants resident in the Black Country. By targeting people in low skilled work and supporting progression to higher level jobs through skills provision, the pilot aimed to create vacancies for entry level jobs would provide new entrants or returners to the labour market a 'foot in the door' to the labour market.

Messaging directed at potential learners focused on raising aspirations, centred around the idea that "this could be you". Additional messages focused on the tangible increases in income and returns on investment that individuals may receive by engaging in career learning. Hard-copy flyers were designed to promote the offer of a travel subsidy, to test whether removing wider cost-related barriers to learning would encourage take up. These hard copy flyers also advertised the offer of the course fee subsidy, whereas other methods of outreach, such as social media routes, did not. A separate set of messages were targeted at employers, which were designed to promote the benefits that accrue to employers and employees when there is a strong skill supply for growth and development. The promoted benefits included increased productivity, unlocking workforce potential, bridging skills gaps and keeping ahead of the competition. A separate set of flyers was designed to

distribute these messages to employers, and to encourage them to support their employees onto subsidised courses.



## Methodology

This chapter describes the aims of the evaluation of the Cost and Outreach Pilots and the methods L&W has used to produce the evidence presented in this report.

### Evaluation aims

The evaluation is focused on assessing the impact of pilot activity on:

- the level of participation in learning, course completions and the achievement of qualifications in pilot areas;
- the profile of learners in pilot areas; and
- longer-term employment and earnings outcomes for individuals who take part in the pilot.

The evaluation will seek to assess whether the pilot has achieved these impacts, how and why any impacts were achieved and the approaches that were most and least effective in this. This will include exploring participant pathways through the pilot and measuring intermediate outcomes, such as attitudinal and behavioural changes. The evaluation will also assess whether the interventions were implemented as intended and consider the suitability and scalability of the models implemented, to inform the design of the National Retraining Scheme.

### Learner enrolments

The analysis presented in this report is based on administrative data<sup>10</sup> for September to December 2018. As this data only presents a partial picture of the academic year, (it does not include projected numbers for the full year), additional enrolments are expected to be shown in full year results. The findings should therefore be treated with caution.

Once final data is available for the full academic year, analysis will be undertaken to look at the full number of enrolments, as well as retention on courses and the number of completions. Analysis will also be undertaken to compare the number of enrolments in pilot areas to previous years and to comparison LEP areas. This will provide a better understanding of the impact of the pilots.

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<sup>10</sup> The individualised learner record (ILR) database:  
<https://www.gov.uk/government/collections/individualised-learner-record-ilr>

## Learner survey

Learners enrolled on subsidised courses were surveyed to gather demographic data unavailable through standard administrative data and to capture baseline information on learners' attitudes and behaviour towards learning. Specifically, the survey collected information relating to:

- learners' attitudes towards career progression;
- barriers to career progression;
- learner motivations for undertaking their current course;
- how learners heard about the qualification;
- awareness and payment of course fees; and
- the effect of the course fee subsidy on their decision to take up learning.

The survey was administered online using contact details included in administrative data. The survey was distributed to 939 learners who were enrolled on subsidised courses as at December 2018.<sup>11</sup> The survey was open for six weeks from December 2018 to February 2019. A total of 173 valid survey responses were received, representing a response rate of 18.4 per cent.

To account for non-response, for the analysis survey responses have been weighted to produce a weighted sample of 915. These weights ensure that the distribution of learner characteristics in the survey sample is closer to that found in the population from which the sample was taken, that is, learners on subsidised courses.

A second survey will be administered in October-November 2019, at least two to three months after course completion. Comparison of the data between the two waves will explore changes in learners' attitudes and behaviour.

## Learner interviews

Semi-structured depth interviews were conducted via telephone with 60 learners who are enrolled on courses that are subsidised as part of the pilot. Participants were recruited via email and telephone using administrative data. Quotas were used to ensure that the majority of participants were in work and qualified at Level 3 or below. Further quotas enabled a rough split between men and women and a spread of different ages. In addition, to ensure the interviews shed light on the effectiveness of the work coach model delivered in the Heart of the South West, learners assigned

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<sup>11</sup> The total number of learner enrolments by December 2018 was 1,022. The online survey was distributed to learners who were still enrolled on their courses as at December 2018.

to a work coach were specifically targeted for interviews and the number of interviewees was boosted. The total number of interviews in each pilot area are shown in Table 1 below.

**Table 1: Number of learner interviews in each pilot area**

<b>Pilot Area</b>	<b>Number</b>
Heart of the South West	25
Stoke on-Trent and Staffordshire	12
Leeds City Region	8
West Midlands	8
Greater Lincolnshire	7
<b>Total</b>	<b>60</b>

The purpose of the learner interviews was to explore:

- learners' experiences and views of pilot outreach interventions with which they engaged;
- learners' experiences and views of IAG interventions they received, including via the work coach pilot in Heart of the South West; and
- how the outreach, IAG and course subsidies have influenced attitudes to learning, the decision to take up learning, and the type of learning taken up.

The qualitative data offers a rich account of learners' attitudes, views and stories. However, only a limited number of respondents reported experiencing outreach and IAG. Therefore, whilst the findings represent individual respondents' experiences, it is not possible to conclude or generalise from the qualitative data the effectiveness of outreach or IAG methods, or what works best for certain target groups.

## Learner enrolments in pilot areas

This section provides an overview of the take up of subsidised courses by the end of December 2018 in each of the five pilot areas. The final list of qualifications agreed for subsidy can be found at Appendix 1.

As Table 2 shows, a total of 1,022 enrolments were recorded on subsidised courses by the end of December 2018 (this may increase by the end of the academic year). Learning providers in the Heart of the South West LEP area recorded the highest number of learner enrolments, making up 30.4 per cent of the total. Providers in the West Midlands area recorded 24.6 per cent of the total enrolments and providers in Stoke-on-Trent and Staffordshire LEP area recorded 18.7 per cent of the total. To date, Greater Lincolnshire and Leeds City Region have the lowest number of learner enrolments recorded.

Note that these numbers reflect volumes of enrolments only, not the potential take up of all available places. Given the variation across the pilot areas, for example in terms of population size and learning provider base, it will be important that future analysis using full-year data includes a comparison with learner numbers in previous years.

**Table 2: Number of enrolments on subsidised courses in each pilot area by end-December 2018**

Pilot Area	Number of total enrolments	Percentage of total enrolments
Heart of the South West	311	30.4%
West Midlands	251	24.6%
Stoke-on-Trent and Staffordshire	191	18.7%
Greater Lincolnshire	136	13.3%
Leeds City Region	133	13%
<b>Total</b>	<b>1,022</b>	<b>100%</b>

Table 3 shows the number of learner enrolments on subsidised courses in each of the pilot areas by Sector Subject Area (SSA).<sup>12</sup> This indicates that the majority (58.1%) of enrolments relate to courses in Business, Administration, Finance and Law. Just over one fifth (20.5%) of the enrolments were on courses in Construction, Planning and the Built Environment and 12.6 per cent are in Health, Public Services and Care. Note the qualifications agreed for subsidy differ across pilot areas. Not all subjects were offered in

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<sup>12</sup> SSAs are a single framework of sectors and subjects used to categorise qualifications. The framework includes two tiers of categories.

all areas. Where qualifications were not available under specific SSAs, this is indicated by 'N/A' in the table.

**Table 3: Tier 1 sector subject area of subsidised enrolments**

<b>Tier 1 sector subject area</b>	<b>Greater Lincolnshire</b>	<b>Heart of the South West</b>	<b>Leeds City Region</b>	<b>Stoke-on-Trent and Staffordshire</b>	<b>West Midlands</b>	<b>Total</b>	<b>% of Total</b>
Business, Administration, Finance and Law	93	264	122	69	46	594	58.1%
Construction, Planning and the Built Environment	5	18	11	0	175	209	20.5%
Health, Public Services and Care	5	2	0	122	N/A	129	12.6%
Engineering and Manufacturing Technologies	4	0	0	0	29	33	3.2%
Retail and Commercial Enterprise	29	N/A	N/A	0	N/A	29	2.8%
Education and Training	0	26	N/A	N/A	N/A	26	2.5%
Information and Communication Technology (ICT)	0	1	0	N/A	1	2	0.2%
<b>Total</b>	<b>136</b>	<b>311</b>	<b>133</b>	<b>191</b>	<b>251</b>	<b>1,022</b>	<b>100%</b>

Table 4 shows the number of enrolments on subsidised courses in each of the pilot areas by level of subsidy. Nearly three quarters (74.3%) of learner enrolments relate to courses that are fully subsidised. Enrolments on courses subsidised at 25 per cent make up 15.4 per cent of all enrolments on subsidised courses, and enrolments on courses subsidised at 75 per cent make up 10.4 per cent of those recorded so far.

**Table 4: Subsidy level of courses taken up by end-December 2018**

	<b>25%</b>	<b>75%</b>	<b>100%</b>	<b>Total</b>
Heart of the South West	3	44	264	311
West Midlands	43	4	204	251
Stoke-on-Trent and Staffordshire	0	54	137	191
Greater Lincolnshire	100	4	32	136
Leeds City Region	11	0	122	133
<b>Total</b>	<b>157</b>	<b>106</b>	<b>759</b>	<b>1022</b>
<b>Percentage of Total</b>	<b>15.4%</b>	<b>10.4%</b>	<b>74.3%</b>	<b>100%</b>

Only a small proportion of the qualifications eligible for subsidy are currently included in the administrative data. This could either be because providers decided not to offer particular qualifications, because adults did not enrol on them, or because we do not yet have the data on enrolments. This should become clearer when full data is available, as well as from wider evaluation activity.

Of all the qualifications agreed for subsidy in each pilot area, the proportion that have at least one learner enrolled are:

- 58 per cent in Heart of the South West;
- 49 per cent in West Midlands;
- 42 per cent in Stoke-on-Trent and Staffordshire;
- 19 per cent in Greater Lincolnshire; and
- 19 per cent in Leeds.

The data shows that courses subsidised at a rate of 75 per cent or 100 per cent are more likely to have enrolments than courses subsidised at 25 per cent. Only a fifth (21%) of courses subsidised at 25 per cent have enrolments recorded, compared with around two fifths of courses subsidised at 75 per cent (40% have enrolments recorded) or 100 per cent (43% have enrolments recorded). This could indicate that the higher subsidy rates have been more attractive to learners, although it could also reflect decisions learning providers have made about which courses to run.



## Profile of learners

The target group for the pilots was predominantly working adults with low to medium skills. As Table 5 shows, just over three quarters of learners on subsidised courses were working (65.2% were employed and 10.5% were self-employed) at the time of enrolment.<sup>13</sup> A total of 14.3 per cent of learners on subsidised courses were not in paid work (11% were looking for work and 3.3% were not).

Nearly one third (30.4%) of learners on subsidised courses were qualified to Level 3 and 28.8 per cent held a Level 2 qualification at the time of enrolment (Table 6). While subsidised courses are at Levels 3-5, 17.1 per cent of learners already had a qualification at Level 5 or above.

Examining the breakdown by level of subsidised course shows that, at the time of enrolment:

- nearly half (48.8%) of learners on Level 3 courses held qualifications at Level 2 or below;
- nearly a quarter (24.8%) held qualifications at Level 3; and
- a fifth (20.4%) of learners on Level 3 courses held qualifications at Level 4 or above.

This indicates that learners may have decided to enrol on a course that doesn't relate to their previous qualifications, perhaps in order to retrain.

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<sup>13</sup> Note the figures are based on 1,021 learners as one learner was enrolled on two subsidised courses.

**Table 5: Employment status of learners enrolled on subsidised courses**

	<b>Employed</b>	<b>Self Employed</b>	<b>Not in paid employment, looking</b>	<b>Not in paid employment, not looking</b>	<b>Not known/not recorded</b>	<b>Total</b>
Heart of the South West	253	16	28	8	5	310
West Midlands	115	76	47	9	4	251
Stoke-on-Trent and Staffordshire	162	1	18	6	4	191
Greater Lincolnshire	107	2	15	11	1	136
Leeds City Region	29	12	4	0	88	133
<b>Total</b>	<b>666</b>	<b>107</b>	<b>112</b>	<b>34</b>	<b>102</b>	<b>1,021</b>
<b>Percentage of Total</b>	<b>65.2%</b>	<b>10.5%</b>	<b>11%</b>	<b>3.3%</b>	<b>10%</b>	<b>100%</b>

**Table 6: Highest previous qualification of learners enrolled on subsidised courses**

<b>Subsidised course level</b>	<b>None</b>	<b>Level 1 and below</b>	<b>Level 2</b>	<b>Level 3</b>	<b>Level 4</b>	<b>Level 5 and above</b>	<b>Other</b>	<b>Not known / NA</b>	<b>Total</b>
Level 3	9.0%	7.9%	31.9%	24.8%	3.2%	17.2%	1.0%	5.0%	100.0%
Level 4	1.2%	1.2%	19.8%	51.2%	3.7%	16.7%	0.0%	6.2%	100.0%
Level 5	0.0%	2.5%	2.5%	60.0%	17.5%	17.5%	0.0%	0.0%	100.0%
<b>Total</b>	<b>7.4%</b>	<b>6.7%</b>	<b>28.8%</b>	<b>30.4%</b>	<b>3.8%</b>	<b>17.1%</b>	<b>0.8%</b>	<b>5.0%</b>	<b>100.0%</b>

Two fifths (40.2%) of learners on subsidised courses were aged 24 to 34 years at the time of enrolment, with a further third (34.8%) aged 35 to 49 (Table 7). A total of 15.7 per cent of the learners were aged 19-23 and 9.2 per cent were aged 50-64. Only two learners were aged 65 or over.

**Table 7: Age group of learners enrolled on subsidised courses**

	19-23	24-34	35-49	50-64	65+	Total
Heart of the South West	40	96	131	43	0	310
West Midlands	42	122	75	12	0	251
Stoke-on-Trent and Staffordshire	36	76	62	15	2	191
Greater Lincolnshire	35	59	36	6	0	136
Leeds City Region	7	57	51	18	0	133
<b>Total</b>	<b>160</b>	<b>410</b>	<b>355</b>	<b>94</b>	<b>2</b>	<b>1021</b>
<b>Percentage of Total</b>	<b>15.7%</b>	<b>40.2%</b>	<b>34.8%</b>	<b>9.2%</b>	<b>0.2%</b>	<b>100%</b>

Nearly three fifths (59.5%) of learners on subsidised courses were female and just over two fifths (40.5%) were male (Table 8). The proportion of women and men varies considerably across the pilot areas. While men made up 84.1 per cent of learners on subsidised courses in the West Midlands, women made up 81.7 per cent of learners in Stoke-on-Trent and Staffordshire. This could reflect differences in the subjects of subsidised courses. A total of 69.7 per cent of courses with enrolments in the West Midlands were in Construction, which traditionally attract more men than women. Conversely, 64.9 per cent of courses with enrolments in Stoke-on-Trent and Staffordshire were in Health, Public Services and Care, which traditionally attract more women. Differences in gender could also reflect the groups targeted through outreach. Women made up three quarters (75.8%) of learners enrolled on subsidised courses in the Heart of the South West and women with qualifications at Level 2 or below in Western Somerset were one of the target groups in that area.

**Table 8: Gender of learners enrolled on subsidised courses**

	Female	Male	Total
Heart of the South West	75.8%	24.2%	310
West Midlands	15.9%	84.1%	251
Stoke-on-Trent and Staffordshire	81.7%	18.3%	191
Greater Lincolnshire	69.9%	30.1%	136
Leeds City Region	61.7%	38.3%	133
<b>Total</b>	<b>59.5%</b>	<b>40.5%</b>	<b>1,021</b>

## Learner survey

This chapter presents analysis of the first wave of an online survey completed by learners on subsidised courses. A total of 939 learners were invited to take part and the survey achieved an 18% response rate, resulting in 173 valid responses. Responses to the survey have been weighted, to produce a weighted sample of 915. This reduces, but does not eliminate, response bias and better represents the attitudes of all learners. The percentages presented in this chapter have been weighted, unless stated otherwise. All differences reported in this section are statistically significant at the 5 per cent level.

The survey findings provide a baseline on learners' attitudes towards learning and career progression, including:

- motivations for enrolling on their course;
- barriers to career progression;
- how they became aware of their course;
- awareness and payment of course fees; and
- the extent to which the offer of a course fee subsidy influenced their decision to take up learning.

## Learner motivations

The vast majority (93%) of respondents reported that their decision to enrol on their course was work or career-related. This section discusses the differences in motivations between those who wished to upskill in their current line of work ("upskillers") and those looking to retrain into a substantially different job ("retrainers"). Of those respondents who were motivated to learn for work or career related reasons:

- 65 per cent can be categorised as "upskillers";<sup>14</sup> and
- 22 per cent can be categorised as "retrainers".

The remaining respondents were either unemployed at the time of enrolling and were motivated to learn to get a job (9%) or indicated they were motivated by something else (5%).

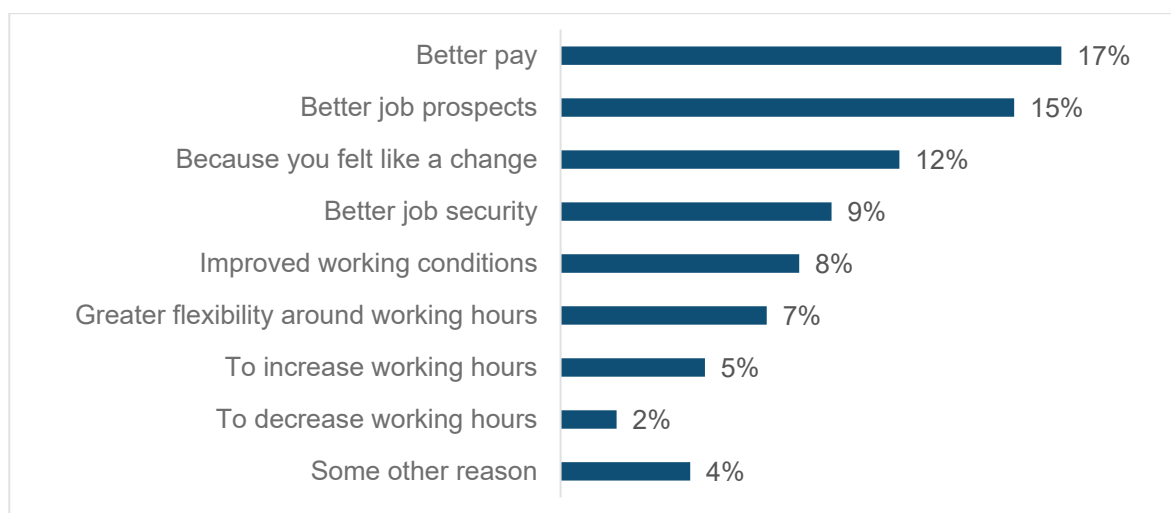
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<sup>14</sup> This includes 50 per cent who said they are motivated to develop or improve in a current/recent role, 15 per cent of respondents seeking a promotion, and 1 per cent who are seeking to gain a similar role to their current line of work.

For those upskillers who undertook their course to gain a new job in their current occupation or to gain a promotion, a clear preference emerged for staying with a current employer:

- Half (50%) of all upskillers seeking a new job or promotion wished to stay with their current employer;
- 29 per cent would prefer a different employer; and
- 18 per cent had no preference.

Retrainers were given a list of reasons and asked to select those which best described why they wanted to change occupation. They could choose as many as they wanted. As Figure 1 shows, the motivations of retrainers were complex and varied. The most common motivation was to increase their pay (17%), followed by improving their job prospects (15%). While 12 per cent of retrainers felt like a change, others were motivated to improve specific aspects of their job, such as job security (9%), improved working conditions (8%) and greater flexibility around working hours (7%).



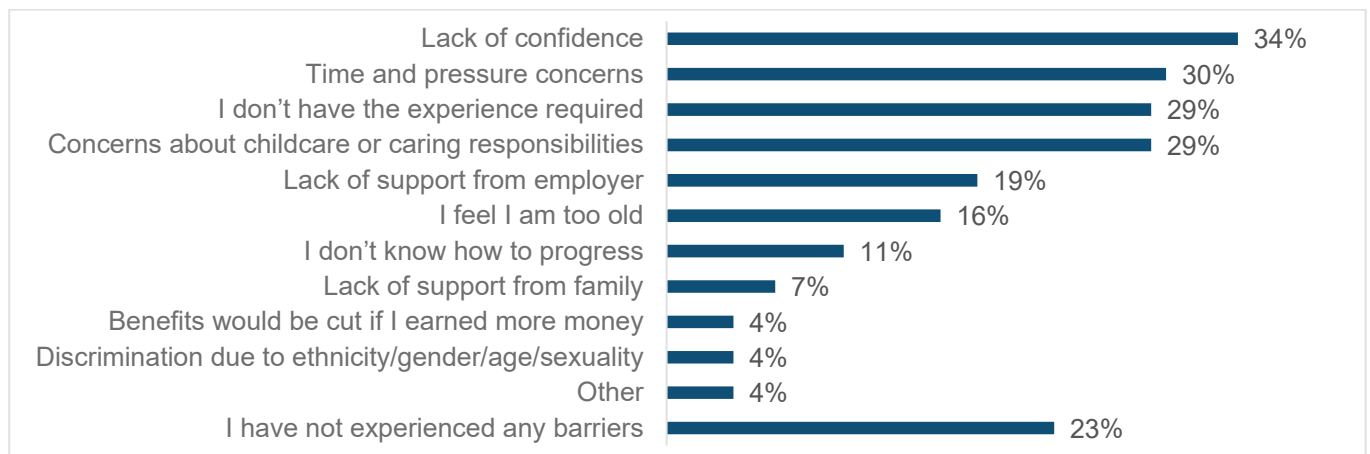
**Figure 1: Motivations of learners looking to substantially change jobs**

Base: All learners looking to substantially change jobs (“retrainers”). Unweighted base=35. Respondents were able to select more than one category.

## Barriers to career progression

Learners were asked about the barriers that they had faced when trying to progress their career. Figure 2 shows that a lack of confidence was the most commonly cited barrier to career progression (34%), followed by concerns over additional time pressures associated with progression (30%). Twenty nine per cent of respondents said that they did not have the experience required to progress their career and 29 per cent had concerns about childcare arrangements. Nearly a fifth (19%) perceived a lack of support from their employer to be a barrier to their progression. While the majority of respondents

identified one or more barriers to their career progression, 23 per cent stated they had not experienced any barriers.



**Figure 2: Perceived barriers to career advancement**

Base: All respondents. Unweighted base=173. Respondents were able to select more than one category.

Approximately one in 10 (11%) learners reported that they did not know how to progress. The survey indicates that these learners were mostly in two occupational groupings with a comparatively low required skill level: Caring, Sales & Customer service; and Process, Plant and Machine Operative.

Retrainers reported facing more barriers to career progression than upskillers. Just over half (53%) of all retrainers perceived themselves to face three or more barriers to progression, compared with just 17 per cent of upskillers. Common barriers for retrainers included:

- a lack of experience (62%);
- concerns about childcare (47%);
- and a lack of confidence (39%).

Compared with upskillers, retrainers were more likely to be younger (with a higher proportion aged 24-34 years) and much more likely to be employed in occupations that are classified as lower skilled work.

## Attitudes to career progression

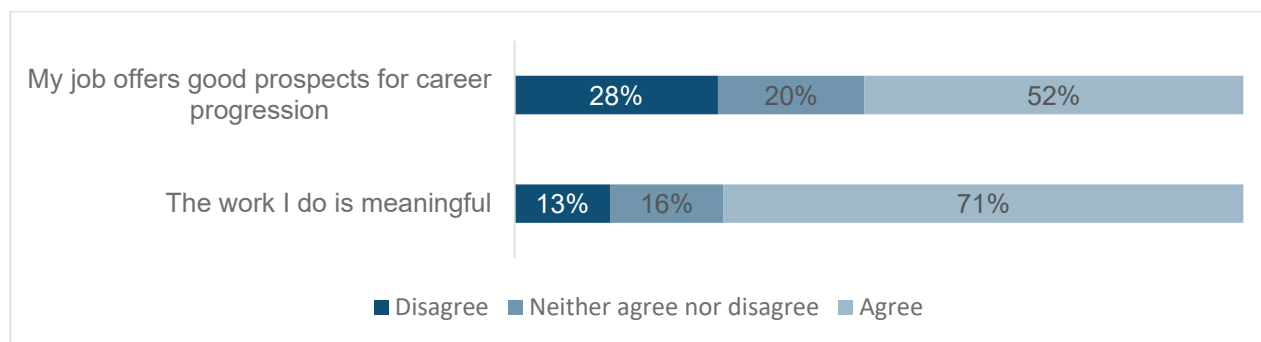
This section reports on learners' perceptions of the potential for career progression in their current workplace, focusing on the relationship between these attitudes and the decision to retrain or upskill.

## Attitudes towards current employment

Figure 3 shows the views of employed learners, who made up 82 per cent of respondents, on the progression prospects of their current job and the extent to which they believed the work they do is meaningful. Just over half (52%) agreed that their job offers good prospects for career progression, 28 per cent of learners disagreed and the remaining 20 per cent neither agreed or disagreed with the statement. Those who perceived their job to have poor progression prospects were five times more likely than the rest of the cohort to report a desire to retrain.

The majority (71%) of employed learners believed that the work they do is meaningful, while 13 per cent disagreed and 16 per cent neither agreed or disagreed. Again, perceptions of work being meaningful were associated with a desire to retrain; those who did not agree that their work is meaningful were seven times more likely than the rest of the cohort to report a desire to retrain into a substantively different kind of job. Taken together, these results suggest that where employment lacks visible progression opportunities, or does not offer a sense of purpose, individuals are more likely to want to retrain into an altogether different role.

Compared with upskillers, retrainers were around 10 times more likely to report poor progression prospects in their current role and around 9 times more likely to disagree that the work they do is meaningful.



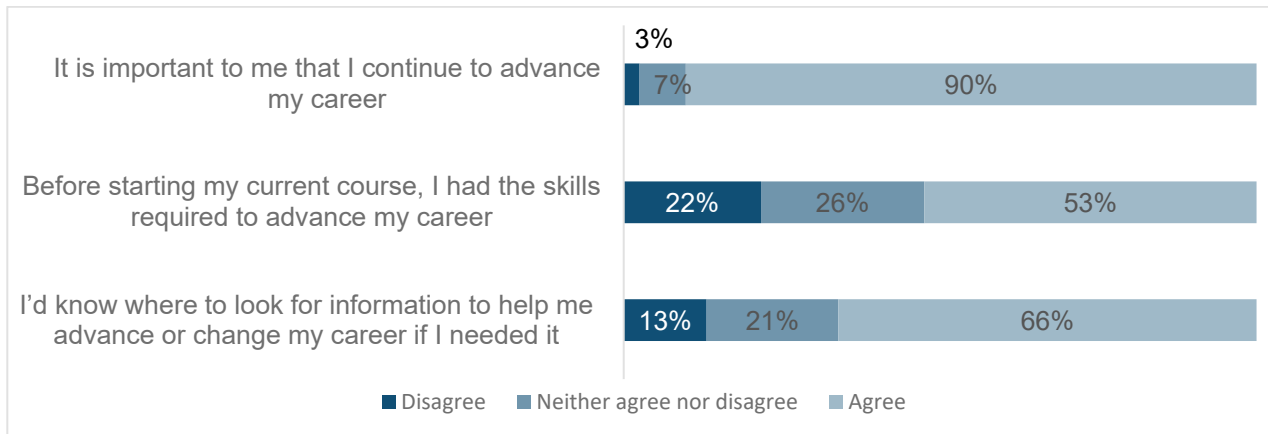
**Figure 3: Attitudes towards current employment**

Base: all respondents currently in employment, or who were employed within the last 3 months.  
Unweighted base=149.

## Required information and skills

Nine in 10 (90%) learners agreed that it was important for them to advance their career (Figure 4). Just over half (53%) of learners responding to the survey believed that they had the necessary skills to advance their career prior to starting their course, while 22 per cent disagreed that they had the skills required. Two thirds (66%) of respondents said they would know where to look for information to help them advance their career, although 13 per cent disagreed.

Retrainers were less likely than upskillers to agree that they know where to look for information to help them advance their career (44% of retrainers agreed with this statement, compared with 74% of upskillers).



**Figure 4: Attitudes towards skills and information for progression**

Base: all respondents. Unweighted base=173.

## Payment of course fee

Courses offered under the pilot were subsidised at a rate of 25 per cent, 75 per cent or 100 per cent. Learners who enrolled on courses subsidised below 100 per cent were required to cover the remaining costs. The survey asked a series of questions relating to the payment of course fees and explored additional costs that learners experienced as a result of their learning.

- Just over two fifths (42%) of respondents stated there was no fee attached to their course;
- 27 per cent stated that there was a fee, but they were not required to pay it themselves;
- Just under a quarter (24%) of learners paid some level of course fee; and
- 7 per cent did not know whether they paid a fee.

For the 51 per cent of learners with a fee attached to their course:

- Two fifths (41%) took out an Advanced Learner Loan to pay the remaining course fees;
- 17 per cent self-funded; and



- 14 per cent received financial support from their employer.<sup>15</sup>

Over a quarter (28%) of upskillers on part subsidised courses received some financial support from their employer, but no retrainers reported receiving financial support from their employer.

When asked about additional costs incurred as a result of their learning, around half of survey respondents highlighted costs associated with the purchase of additional course materials (55%) and for travel (50%). Other costs incurred included:

- reduction in pay due to lost time at work (16%);
- additional childcare costs (13%); and
- stopping work to complete course (one%).

In some cases individuals incurred more than one additional cost. While 70 per cent of learners incurred some kind of additional cost, 30 per cent incurred two additional costs and 17 per cent incurred three or more.

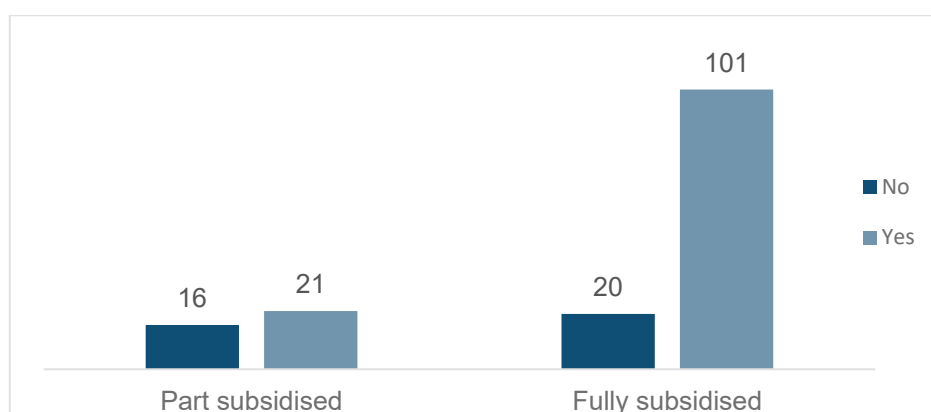
## **Behavioural effect of the course fee subsidy**

The majority (89%) of learners responding to the survey were aware that their course was subsidised by the Government. Three quarters (75%) of learners who were aware of the subsidy said that it had encouraged them to enrol on their course.

Figure 5 shows that a greater share of learners on fully subsidised courses stated that the subsidy influenced their decision to enrol, compared with those on part subsidised courses. Just over half of respondents (21 out of 37) on part subsidised courses agreed they were encouraged by the subsidy. Whereas, just over four-fifths of learners (101 out of 121) on fully subsidised courses stated that the offer of the subsidy encouraged them to enrol on their course.

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<sup>15</sup> Respondents could select more than one option. The remaining options were 'some other way' (26%), 'prefer not to say' (3%), and 'borrow money from friends or family' (3%).



**Figure 5:**

### **Behavioural impact across different levels of part and fully subsidised courses**

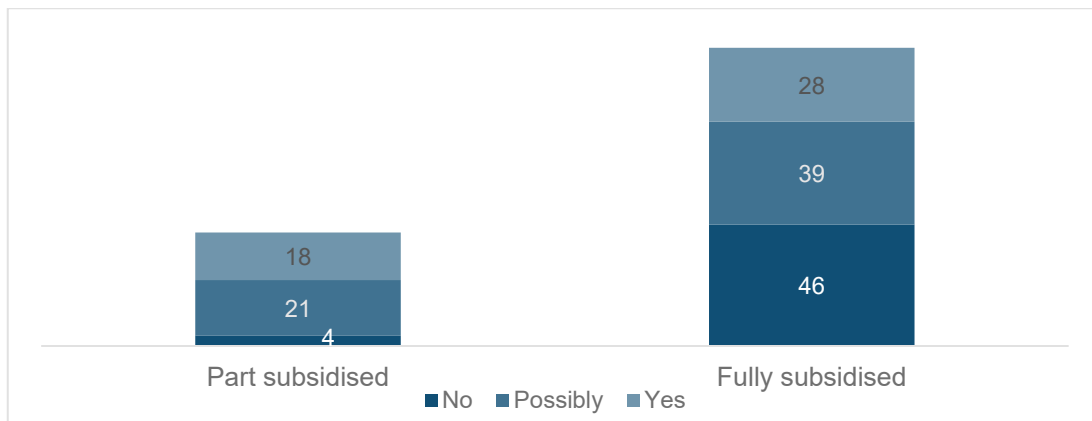
Base: all respondents who were aware of the course fee subsidy. Total unweighted base=158, Part subsidised=37, Fully subsidised=121. Figures presented in this chart are unweighted.

In terms of learners' characteristics, the survey suggested that the subsidy was most effective at encouraging self-employed individuals to take up learning. All of the eleven self-employed respondents stated that it had encouraged them to enrol, compared with four-fifths of unemployed respondents (20 out of 25) and three quarters of those who were employed (91 out of 122).

### **Willingness to pay (more) towards course fees**

Individuals were asked whether they would pay more (or pay) for their qualification if it was not subsidised; 27 per cent said they would, 34 per cent said they possibly would, and 27 per cent said they wouldn't.

Figure 6 shows that adults on fully subsidised courses were less willing to pay more for their course than those on part subsidised courses. Around two fifths (46 out of 113) of learners on fully subsidised courses said they would not be willing to pay for their qualification, compared with around one in ten (4 out of 43) of those on courses that were part subsidised. The pattern is even more pronounced when looking at those who did and did not pay a fee; 45 per cent of those who paid a fee said they would pay more, compared with 24 per cent who didn't pay any fees for their course.



**Figure 6:**

### **Willingness to pay more, by subsidy level of qualification**

Base: all respondents, excluding those who responded 'I don't know'. Total unweighted base=156, Part subsidised=43, Fully subsidised=113. Figures presented in this chart are unweighted.

## **Referral Routes**

Learners were asked where they first heard about the qualification they were undertaking. This indicates which communication methods were most successful in encouraging adults to take up learning. The most commonly cited method was through a college or learning provider's website (41%), followed by a current or previous employer (22%). The National Careers Service, which delivered outreach and IAG in some of the pilot areas, was the least common method of hearing about pilot qualifications, at two per cent. It is possible however that a greater proportion of learners were reached by the National Careers Service, for example through marketing materials, although they may not have necessarily associated this with the Service, particularly where alternative branding was used.

Different referral routes appeared to be successful at engaging adults in different circumstances. Employed adults were most likely to hear from their employer or a learning provider's website. Self-employed adults were more likely to hear about their course via a learning provider's website or social media, while unemployed individuals were more likely to hear about their qualification via leaflets, the National Careers Service or a learning provider's website.

## Learner interviews

This chapter sets out findings from qualitative depth interviews carried out from December 2018 to February 2019 with a sample of 60 learners enrolled on provision delivered through the pilots. This is the first wave of learner interviews focusing on their involvement with the pilots from initial contact to course enrolment. Further interviews focusing on learners' experiences on the course will be carried out during the next wave, towards the end of their course in summer 2019.

Participants were sampled to reflect a range of characteristics, rather than to be representative of all learners. The characteristics of learners interviewed are summarised in Table 9 below. Although this report includes some indications of how typical views were across interview participants, this should be considered indicative among those interviewed. It does not give a measure of the prevalence of different views among all learners.

**Table 9: Learners who participated in interviews**

Pilot Area	Total Number	Employment status		Highest qualification			Gender		Age			
		In Work	Out of Work	L2 and Below	L3	L4+	Male	Female	25-34	35-44	45+	Unknown
Heart of the South West	25	22	3	5	9	11	8	17	3	9	5	8
Stoke on-Trent and Staffordshire	12	9	3	6	5	1	4	8	2	4	5	1
Leeds City Region	8	8	0	3	2	3	4	4	4	2	2	0
West Midlands	8	8	0	4	4	0	4	4	3	2	1	2
Greater Lincolnshire	7	6	1	4	1	2	2	5	4	1	2	0
<b>Total</b>	<b>60</b>	<b>53</b>	<b>7</b>	<b>22</b>	<b>21</b>	<b>17</b>	<b>22</b>	<b>38</b>	<b>16</b>	<b>18</b>	<b>15</b>	<b>11</b>

The chapter begins by summarising participants' general experiences of and attitudes towards learning. It then provides an in-depth analysis of their experiences and views on pilot outreach and information, advice and guidance (IAG), and the influence of course subsidies and other factors on decisions to take up learning.

## Experiences of and attitudes towards learning

**Many participants stated that they had recently completed other formal education or training (i.e. within the last three years), prior to enrolling on one of the courses subsidised as part of the pilots.** In a small number of cases, participants appeared to be studying concurrently for several qualifications. In contrast, some participants had returned to learning after a considerable break and several stated that they had not done any learning since completing their initial education.

**Attitudes to learning expressed by participants were overwhelmingly positive, among both recent learners and those returning after a break.** Answers which expressed love for, or enjoyment of, learning were common, and some participants described non-work-related learning that they were also undertaking. Several participants described how they had dismissed or disliked learning at school, but now enjoyed it. One participant, returning to learning at the age of 43 for the first time in 25 years, reported how her confidence and abilities as a learner were growing:

Before I'd sort of like get the new topic and think, 'Oh God, I'm never going to get this', but now I think, 'Well now I've got-, I didn't think I'd get the last thing and I got that; so now every time I get something new I just see it as a challenge and, you know, just work my hardest to learn it. -

*Learner, West Midlands*

At the same time, a small number of participants qualified their comments by noting that learning can be stressful or difficult, as well as enjoyable. One learner, who worked part-time and has two young children, stated that it can sometimes be a "chore", hinting at the challenges of juggling learning, work and family. Three participants with dyslexia also noted that, while they enjoy learning, their learning history has been shaped by their condition. Two stated that they had not enjoyed learning at school because of it while the other stated that it is "always a battle" to get the support she needs.

## Experiences of outreach

Only 15 participants stated that they had encountered outreach activities funded through the pilot. Of these, 12 were learners in the Heart of the South West pilot and the remaining three were in the Stoke-on-Trent and Staffordshire pilot. Participants who were engaged on courses via other routes cited a range of methods of engagement, including:

- through an employer;

- through college marketing or publicity, including information on provider websites; and
- progression to subsidised courses from lower level courses in the same subject area.

The small proportion of participants who experienced pilot outreach means that it is not possible to draw conclusions from the qualitative data about either the effectiveness of different outreach methods and messages or what works for different target groups. However, analysing the narratives of the 15 participants who were initially engaged via outreach sheds light on the ways in which individual learners responded to specific approaches and messages.

**All participants who encountered outreach indicated that the critical message which engaged their attention and prompted them to take action was the information that the course would be free or at least partly subsidised.** One participant stated:

I think, obviously, cost is something that gets in the way of learning and, I think, some of the members of the group thought the ILM Leadership Level 3 was of interest to them, which they probably wouldn't have considered doing otherwise. - *Learner, Heart of the South West*

A learner who was engaged via outreach with her employer, the local authority, said:

I could see that there was the potential for it to be funded, because obviously, money-wise, I wouldn't have been able to afford to do that. I definitely knew that the council wouldn't have been able to afford to, sort of, pay for me. ... That was like 100 per cent the thing that caught my eye and made me think it was worth doing. - *Learner, Heart of the South West*

A self-employed learner said,

I initially saw it via a Facebook post.... I saw that it was offering these training courses and subsidised as well. With them being subsidised as well, that really was the key to be honest. You know, I thought, even if I have to contribute a little bit, at least it's going to a lot cheaper than if I had to pay for it all myself. -*Learner, Stoke on Trent and Staffs.*

In some cases, participants suggested that the availability of funding accelerated their journey as they have not had to save to fund the course themselves.

Other evidence confirmed the **importance of outreach messages being perceived by learners as personally relevant.** One participant, a woman with a young family who is

aiming to return to work, noted that the outreach she encountered seemed to be targeted at people like herself:

It's that kind of image [of a woman who "looked like a mum"], yes, I guess I associated with, like, "mum return to work"... It wasn't a young 16 to 18 year-old or anything. - *Learner, Stoke on Trent and Staffs.*

In most instances, however, the evidence suggests that perceptions of relevance were linked primarily to the subject and level of the courses that were on offer. A learner who enrolled on a Level 5 Leadership and Management course after being reached via targeted material in her employer's internal newsletter observed that the approach was effective because the opportunity chimed with her own interests and ambitions, and those of a number of other colleagues within the organisation. Indeed, the responses from three other learners in Heart of the South West, who were also engaged through this route, indicated that hearing about the pilot opportunities in the workplace strengthened their appeal because there was an implied link to individuals' professional development plans and career aspirations.

**Most of the participants who encountered outreach stated that the intervention was instrumental in prompting them to seek further information and take steps towards enrolling on a course.** For example, one participant, who was engaged through a face-to-face presentation, stated that up until that point she had not been considering undertaking learning. This supports wider evidence that face-to-face delivery can be particularly helpful for reaching adults who may not participate in learning otherwise.<sup>16</sup> In contrast, another learner reported that she had already started a course at an equivalent level but in a different subject with the Open University when she found out about the subsidised courses through social media. She decided to change as the OU course was expensive and she was not enjoying the subject. It is important to note that **none of the learners reached via outreach reported a change in their attitude to learning, which was generally already positive. Rather, they were prompted to take specific action which might otherwise not have occurred.**

While the messages communicated via outreach clearly gained traction with these learners, comments from participants indicate that they could be strengthened by improvements in their presentation and clarity. Two learners who responded to outreach via social media were initially unsure whether the posts were genuine, with one stating, "I thought it was a scam." Another participant reported that the initial information she encountered did not make it clear whether people in work were eligible for funding.

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<sup>16</sup> For example, Pennacchia, J., Jones, E. and Aldridge, F. (2018) *Barriers to learning for disadvantaged groups*

Due to the small size of the sub-sample of participants who encountered pilot outreach, evidence from the interviews does not significantly enhance our understanding of which approaches work for which target groups. However, wider analysis of engagement methods by the working status of participants yields some indicative findings. Some participants in the sample were engaged through their employer. It has already been noted that outreach encountered in the workplace appears to be effective when it is perceived by the recipient to be relevant to their professional development and career aspirations. The fact that information about training delivered via this route is implicitly endorsed by the employer may give additional weight to the message.

## Experiences of information, advice and guidance (IAG)

Eighteen participants experienced IAG as part of the pilot. Three were in the Stoke-on-Trent and Staffordshire pilot and 15 were in receipt of the work coach support delivered as part of the Heart of the South West pilot. Many of these participants identified the service provided as initial learner support rather than IAG. Meanwhile, some participants in Heart of the South West who, according to our records, have been offered work coach support, reported that they have not yet accessed this IAG service.

Participants reported following a number of referral and signposting routes to IAG. A small proportion received a referral to IAG after phoning the provider number on official outreach materials. Others were referred after contacting a college directly to enquire about a course. Some participants from Heart of the South West were introduced to the IAG offer when work coaches attended a class. These participants did not receive a direct referral, but instead, were invited to self-refer to a one-to-one appointment with a work coach if they subsequently felt that it was necessary.

Participants' testimonies suggest that, in most cases where IAG was experienced, this did not take the form of in-depth advice or guidance. Rather, work coaches/careers advisers provided information about the subsidised courses that were of interest to participants, including duration, course start date (where known), level of subsidy and mode of learning. Advisers checked participants' suitability for courses and helped some participants with application forms. In general, individuals had spoken to their work coach/careers adviser after they had decided on a learning option, with the aim of finding out more practical information about the course. **These interactions with IAG professionals therefore did not influence participants' attitudes and behaviours or inform their decision making to take up learning.** In only a small number of cases does it appear that discussions occurred beforehand and involved consideration of more than one course.

Several participants stated that, in retrospect, they would have welcomed more substantive IAG, for example, to help them to understand what jobs their courses will qualify them for:



“That would be the only thing that I would probably suggest in the future, is a few more ideas of what people can do with the qualifications, to say, ‘This isn’t just the qualification, this is what you can go on to do. -  
*Learner, Stoke-on-Trent & Staffordshire*

However, a larger proportion of working participants – particularly those on a defined career path – felt that they did not require IAG, as the following comments illustrate:

Most of us are older students in full-time work... I wouldn’t really need it really, careers-wise - *Learner, Stoke-on-Trent & Staffs.*

I mean, I don’t know what [the work coach] could have said, do you know what I mean? To be quite honest if there was any [IAG support], I don’t know what it would have accomplished because I’m not, I, kind of, know where I’m going and what I want to do. - *Learner, Heart of the South West*

## Experiences of the work coach model

The pilot in the Heart of the South West is testing a work coach model, whereby individuals receive tailored, intensive and sustained IAG support before and throughout their learning course. The purpose of the approach is to ensure that learners are not only supported to access and complete their course, but that work coaches support them to ensure their increased knowledge and skills is translated into career progression. Work coaches may therefore help individuals to improve their CV, search for jobs, and improve their interview technique. They may support learners by brokering work experience opportunities or troubleshooting practical obstacles to learning, such as transport or childcare.

Some of the participants who are accessing work coach support stated that they had received specific help in relation to employability, overcoming barriers to learning, and career planning. These experiences are described below. It should be noted that the evidence gathered to date indicates that the work coach model may not have been fully implemented as intended. As noted above, not all learners assigned to work coaches have received IAG support, impacting on the volume of individuals who could discuss the effectiveness of the approach. The examples of support summarised below are not as varied or as intensive as might be expected for an individualised approach aimed at supporting career learning and progression.

### Employability information and advice

Employability information and advice was provided to some participants to help them apply and interview for jobs. Participants described a range of different delivery models for this. Two participants attended CV workshops delivered to their whole class and

two participants attended one-to-one sessions with work coaches during which feedback and support was provided on their CVs. Participants who attended one-to-one employability sessions stated that they are more confident and feel that the support they have received will improve their chances of successful job-hunting:

Obviously, you have a good resume and your confidence doubles, and you go for the interview, because you know it's been professionally done, as well. Definitely it has given me a good boost. - *Learner, Heart of the South West*

### **Support to overcome barriers to learning**

Some participants discussed potential barriers to learning with their work coach. For example, one participant reported how the affordability of childcare was a barrier:

We did talk about any potential support for childcare because that was something that actually made me think, 'Oh, I might not be able to justify doing it,' just because... fuel and parking and childcare, it was just costs I wasn't 100% sure I really should be justifying on the family budget really. - *Learner, Heart of the South West*

As a result of the support and signposting provided to the participant following this conversation with the work coach, the participant enrolled on the course and has been able to claim back some costs for childcare.

### **Support with career planning**

One participant said that career planning and action planning had featured in her interactions with her work coach. Another participant described how she had been offered a careers guidance interview as part of the support offer and opted for this to take place midway through her course. The participant, who has already received support with career planning, explained that this input has helped her to clarify her aspirations and increased her confidence:

It was really helpful. It confirms on paper your aspirations you have doesn't it? And your goals... I think it gave me the confidence to aspire to move on in the future. - *Learner, Heart of the South West*

## **Course enrolment**

This section presents participants' motivations for enrolling on a course. It includes discussion of both underlying factors and more immediate triggers for taking up learning and looks in detail at the influence of the fee subsidies on decisions to enrol. It is important to note that for some participants, there does not seem to have been a single

trigger: rather, there are several factors that have combined to encourage action. Therefore, the factors discussed below are not mutually exclusive. In some cases, it has not been possible to determine if one factor was more influential than others.

## Motivations for taking up learning

In some way, **all participants attributed their participation in the subsidised courses to plans and ambitions regarding their future employment.** Employment-related ambitions cited by participants included: changing the sector or occupation in which they work; establishing a new career; progressing in their current occupation or profession, either with their existing employer or in a new organisation; and progressing to management roles.

Some participants were in the relatively early stages of their proposed career journey; for example, they had begun to identify what further skills and qualifications they will need to progress and the subsidised course represented a step on the way. Others had very clear intentions. For example, one participant aimed to become a registered nurse. At the time of the interview she was combining health and social care training through the pilot with voluntary work in the care sector and also working part-time as a bank nurse. A minority of learners were unclear about the exact career trajectory they wish to pursue. For them, the subsidised course was a potentially valuable way of keeping their options open, improving their general positioning to respond to future opportunities, or guarding against uncertainty in the labour market.

A number of participants stated that they were undertaking training in the hope of achieving greater job security. This is worth noting, in light of the aim of the National Retraining Scheme (NRS) to provide support to adults in precarious or at-risk employment. One participant stated that, having been made redundant twice now, she wanted to move out of retail and into business administration. Another worked as a recruiter for the engineering sector and wished to retrain as an electrical engineer. He stated that his understanding of the sector means that he knows where the skills gaps are and hence where to specialise to ensure that he will be able to get work once qualified. A participant who has chosen to retrain in hairdressing stated that this is because it is at low risk of automation. Two participants indicated that they hope training will enable them to move away from zero hours contracts. One of them, currently working as a carer, is exploring the possibility of retraining as a healthcare assistant in a GP practice:

The job role that they were advertising sounded really good. I thought... it'd be nice if I've got a little career and also the stability then of perhaps a pension rather than being on zero contracted hours, which I'm on now.  
- *Learner, Stoke-on-Trent and Staffs.*

On a slightly different but related note, another participant was taking a course in order to improve his chances of being retained in what is currently a temporary post.

Other participants cited motivations for training linked to: a wish to progress in relation to remuneration (pay and pensions); the desire to take on more responsibility or secure a more interesting job; achieving better work-life balance, through being able to work part time or more sociable hours; doing a less physically demanding job as they aged; and presenting a better role model for their children. In one instance, a participant also mentioned an intrinsic interest in learning something new.

## Triggers for learning

Alongside these underlying desires to progress in work, participants cited a number of specific factors and more immediate events which had prompted them to take the action to enrol on a subsidised course. (The role of the subsidy as a trigger is discussed in the subsequent section on costs of learning.)

### Change in personal circumstances

For some participants, participation in learning was prompted by a change in personal circumstances such as loss of employment, a partner's loss of employment, or unexpected challenging circumstances. For example, one participant's partner had not been able to find full-time work. Another participant was made redundant from her retail job and described how this change in personal circumstances led to a re-evaluation of her career interests and prompted her to begin career planning. She realised that she wanted to move into administration, but did not have the experience and qualifications required for advertised jobs, which led her to enrol on a course:

It's the second time I've been made redundant now, and I just, you know, had enough of retail really. Some of the jobs I've done have had, sort of, that admin-y type element to it, so it was something I was looking at and then I was looking at jobs and I just didn't have the admin experience or qualifications just to go for that sort of job. - *Learner, Heart of the South West*

A handful of other participants were prompted to enrol because their children are now older. As a result of this change, participants perceived that they now have enough time and resources to invest in learning.

I kind of weighed everything up and I thought, 'Yes, I am going to be doing it now because the children are growing up, they're not quite as dependent on me as they once were', and I thought I can obviously do my homework at evening times and you know, I was determined to make it work. - *Learner, Stoke-on-Trent & Staffordshire*

For this participant, seeing the advertised courses was important; however, the shift in her personal circumstances was the trigger for her to enrol on the course now, rather than putting it off for another year.

### **Recently completed lower level of qualification**

A number of participants had already completed a qualification with a learning provider and had set their sights on progression to the next level in the same subject. As a result, they saw it as a natural progression to continue to the next level of learning. In these cases, the trigger was receiving an email or a message from their college about opportunities at the next level.

In some cases, had the subsidy message not been communicated, participants would not have moved on immediately to the next level, for example because they would have had to weigh up the costs and benefits of taking out a loan.

### **Recent or potential promotion**

Several participants were prompted to take up learning following a recent promotion at work. Undertaking a training course was part of their development plan to help them to build relevant skills. The decision to take up learning now was triggered when they heard the message about a relevant course either through their manager or their own research:

Well, it's the one that came along, you know, I didn't know about the others. I just saw that it was an ILM Level 3 and leadership and management, so it fitted what I needed to do and it was funded for, you know? So, it's literally a no-brainer. - Learner, Heart of the South West

Other participants had recently had performance and development reviews which had identified the need for further training. For example, one participant from Leeds City Region recognised in her annual performance review at work that she would like to do some formal leadership and management training, and the HR training lead in her organisation did some research and found the subsidised course.

### **Costs of learning**

This section sets out evidence on participants' experiences of and attitudes towards meeting the costs associated with learning. First, it looks at course fees, and in particular the role and impact of the subsidies that are available through the pilot on learners' decisions to undertake a course. It then considers the wider financial and opportunity costs of participation.

While this section includes some indications of how typical views were across interview participants, this should be considered indicative among those interviewed. Participants

were sampled to reflect a range of characteristics, rather than to be representative of all learners.

### **Role and impact of course subsidies**

Thirty participants stated that the subsidy had little or no impact on their decision to take the course on which they are enrolled. Of these, ten were already enrolled on their course when they found out about the subsidy, funded either by their employer, a loan or self-funding. The others said that they had intended to fully fund the course by one of these other means. Seven participants stated that their employer would have paid, and seven said that they would have taken out an Advanced Learner Loan. One participant stated that the availability of a loan had been her key financial consideration prior to enrolling, and without that she would not have considered doing the course. Another learner, for whom the first year of a two-year course is now fully subsidised, stated that she had already been investigating loans when she was offered the subsidy:

I'd already had my interview at that point, and I'd been offered the place then. And then obviously when I had my interview, I didn't know about the pilot scheme, so I was sort of researching loans and things, but that's when I got the email and then the link at kind of the same time. -

*Learner, Stoke on Trent and Staffs.*

Another learner had already taken out a loan when she was offered a 75 per cent subsidy and continues to fund the remaining fees through a combination of a loan and self-funding.

Several participants stated that they felt the subsidy had been important in the sense that it had raised the profile of the course in promotional material and therefore brought it to their attention, but the funding itself made no difference to their selection of a course or their decision to enrol.

In one highly atypical case, a participant reported that he had left the course as a result of the subsidy being applied. He had intended to fund the training himself, but in the second week of the course, the whole class was told that their fees would be fully subsidised. However, the participant was subsequently told that he was outside the eligible geography for the subsidy, and as a result withdrew from the course.<sup>17</sup>

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<sup>17</sup> Note there was no eligibility criteria for learners, the subsidy was tied to the qualification and provider. In this instance, this decision was made by the provider based on their interpretation of the pilot aims.

The other 30 participants stated that the subsidy had impacted in some way on their decision to enrol on their course. For a large proportion of these participants, the subsidy was the main trigger that tipped the balance in their decision-making:

The fact that it was free and that I wouldn't have to take out a loan or anything like that, that was 100% the thing that made me-, there were no barriers for me, basically. So, there was nothing for me to consider or go away and think about before I made the decision. - *Learner, Heart of the South West*

One participant had previously looked at the course she eventually enrolled on, but had not applied due to course fees. Seeing that the course was now fully funded was the trigger that led her to enrol:

That made me email immediately... because I have looked at it before and, you know, £2,000, £3,000, even with a learning loan, it's like, 'Oh gosh, that's such a lot of money. - *Learner, Heart of the South West*

Another participant had been interested in pursuing a management course for a while but decided to enrol when he found out about the course subsidy.

The range of views and experiences expressed reflects a broad range of personal financial circumstances and priorities among the participants. It also underlines the extent to which, for many adults, **motivation and commitment to training and career development have to be balanced against the other demands on their time and resources.**

Around a third of interview participants stated that it would have been impossible for them to enrol without the full subsidy. Some of those who did so are not in paid employment. For example, one participant stated that she could not have paid as both she and her husband are out of work. Similarly, another participant who is a single parent without paid work and claiming benefits, stated that she was only able to pursue the course because of the subsidy, although she would have tried to get funding via Jobcentre Plus if it had not been available. But equally, a learner who is in full time work said that the subsidy made learning affordable for her:

[The subsidy] is very important to me, because it's something I wouldn't be able to afford, I wouldn't have thought about doing on my own. -  
*Learner, Leeds City Region*

The sense of prioritising was also conveyed by a learner who stated that she would not have been able to justify funding the course herself as it is not essential for her current job:

If I had to pay for it I wouldn't have done it, even with a subsidy... I've kind of paid for my education. I don't need to do anymore qualifications in the job that I'm in so the priority is my family, everyday bills, not investing in my career development. - *Learner, Stoke-on-Trent and Staffs.*

Some participants gave nuanced accounts of how the full subsidy had made it financially possible for them to take the course. For example, one learner stated that because her employer does not have to cover her course fees, the organisation is giving her the day a week she spends in college as paid time off to train. Without this support, which has been granted as a direct result of her receiving the subsidy, she would not have been able to afford to do the course.

If the scheme hadn't been funded, I don't think my employer would have been as willing to pay for me to go to college, to pay the fees. Or, certainly, I get paid for the day to come to college, and I think if he had to have forked out the fees because there's like £1,000, I think, difference between correspondence course and going to college. I don't think I would have necessarily got paid to go and if that had happened, I wouldn't be able to afford to go and study, because I live on my own and I don't earn a lot of money at the moment. I'm just above minimum wage and trying to live on that and on your own, it's really tough, so, for me, the course, the fact that it was subsidised has been brilliant. - *Learner, Heart of the South West*

For these learners it was essential that the course was fully subsidised, as any level of fees would have been a substantial barrier to learning.

Only a very small number of those on fully-subsidised courses (and who stated that the subsidy was essential to them) indicated that they might have been willing to pay something towards their course fees. Their responses did not convey a strong sense that this would in fact have happened in practice. One participant stated that she may have considered the course with a partial subsidy. She suggested that, in the first instance, she would have approached her employer about funding the balance, as they are supportive of professional development and have a training budget. Had that been unsuccessful, she would have considered self-funding on the expectation that it would have increased her chances of progression to a better job.

Another participant stated that her employer is supporting her to take the qualifications, but this is because it is subsidised. She was not sure that her employer would be willing to pay her fees and stated that she would not be willing to take out an Advanced Learner Loan as her experience of playing off a student loan made her highly averse to taking on



further debt for learning. She did indicate that she may be willing to consider funding learning through salary sacrifice.

A minority of participants gave a more mixed response. For them, on the one hand, the subsidy was helpful and has influenced their decision to take a specific course at the present time, but on the other hand, they were already committed to the idea of undertaking training and were actively considering how this could be done.

I was originally going to do it myself... so if [the outreach worker] had said 50 per cent, then... I'm sure me and my husband would've tried to squeeze our finances and paid for the other half... because obviously it was the progression I wanted to do. Or I would have had to wait and saved up maybe until the following year... if it was, like, only 25 per cent, I needed to find 75 per cent, that might be a bit too stretching things too far. – *Learner, Heart of the South West*

One participant stated that she would still have done the course without the subsidy, but would have had to do so with a different provider who offered a flexible delivery model, with evening classes running over a longer period. The subsidy enabled her to cut her hours at work so that she could attend college for one day a week.

The vast majority of participants who stated that the subsidy influenced their choice of course, explained that this was informed by the qualification's relevance to their career plans, and many stated that they had already identified the qualification before they knew that funding was available through the pilot. Less typical was the participant who stated that he decided to take the ILM Level 3 course when he found that it was fully subsidised, rather than the ILM Level 5 that he had previously been considering:

I was actively pursuing more training anyway, but it was a choice between the ILM Level 3 and the ILM Level 5. At the time I made the decision I was favouring the ILM Level 5, and the availability of a subsidised Level 3 changed my mind, if you like. - *Learner, Heart of the South West*

In view of the high proportion of participants who stated that they would have done the learning anyway, it is not surprising that comments about the level of subsidy indicate that for some it is regarded as a welcome bonus. Where participants are funding the remainder of their fees through an Advanced Learner Loan, they tend to see the impact of the subsidy in terms of a future benefit, as it will reduce the amount and duration of repayment.

Participants were asked whether having their learning subsidised increased the likelihood that they would complete their course. Most stated that it would make no difference, stating that they would be determined to succeed however it was funded. Less typical

was the comment from a learner who had already paid fees in full and received a £500 refund once the subsidy was applied. She stated that the money was welcome because she had exhausted her savings, and it meant that she had money available to pay for a resit if she failed any of the exams. It is worth noting that the answers to this question revealed a lack of clarity in the messages being communicated to students on pilot provision. Some participants interpreted it as asking whether having public funding made them more determined not to fail. Others had the impression (because they had seen it in printed material) that if they did not complete the course they would have to repay the funding, although they were not sure whether this was actually the case.

### Other costs of learning

Participants were asked about other costs associated with learning that they had encountered as a result of engaging with the pilot, beyond subsidised course fees. In general, the evidence suggests that meeting these additional costs presents a challenge for a small number of participants due to their personal financial circumstances, but that overall learners accept these costs and in some cases are able to access other sources of support.

Many learners reported that course books were an additional, and often unanticipated, expense. The smallest fee reported was £20, whilst the largest was over £100. A few participants felt that the cost of books was a significant expense. A small number of participants received a grant through their college, or their employer paid for books. One participant explained that this help was a significant factor in enabling him to do the course as money is currently “a bit tight”. However, other learners on low incomes have not received or been offered support and are struggling with the cost of books:

We're struggling a bit with my books but trying to get it sorted... I've tried to find some information online, if I can get a grant or something, but I couldn't find anything. - *Learner, Greater Lincolnshire*

I don't know what to do, because I have to buy [the books], because I've got an exam next month ... I'm a single mum, I've got four kids.-  
*Learner, female, Stoke-on-Trent and Staffordshire*

Participants commonly reported that they incur some travel and parking costs. For many, these are minimal and therefore are not considered a substantial expense. However, some learners on lower incomes find that their travel expenses are financially challenging. Despite this, the sense was that participants are willing to pay these additional travel costs in light of reduced course fees and saw it as their investment in the course. Some learners received a travel bursary from their college or a free bus pass, but others reported that they did not get offered any help or were not eligible for support, for example because they live less than three miles away from their college.

Some participants reported that they are paying additional costs for childcare whilst learning. In the main, affected participants did not perceive childcare costs as outweighing the benefits of undertaking learning, or that these additional costs would negatively impact upon their ability to complete the course. Rather, the perception was that childcare is a worthwhile expense, particularly because the course is subsidised and learning is a personal investment in the future:

Because the subsidy is there, I can still take money out of my pocket and feel at least I've got my course covered, so this is the price to pay for getting my qualification and getting my prospects of good employability in future. - *Learner, Heart of the South West*

Some learners would have incurred additional costs for childcare - which in turn would have negatively impacted upon their ability to take up learning - but have received financial and practical support. In two cases, participants reported that their college has subsidised 90% of childcare fees as they are on a low income, whilst another has a free place at the on-site nursery for her child. A different participant who has not accessed a childcare subsidy has received support through family members, which has been critical for her as she would not have been able to afford childcare.

Two participants stated that the course is having a negative impact on earnings in the short-term. One learner who has two part-time jobs said that she must take unpaid leave from one job to attend college, whilst another stated that the course requirement to be on placement for one day per week in a school means she is not able to apply for jobs that require her to work a five-day week:

Having to do a whole day's work experience of the week teacher practice, that, kind of, element wasn't really explained and I knew I would have to do some teacher practice, but I didn't, quite... envisage it being for a whole day, I thought I'd be able to finish it all in one day, so that, sort of, is actually affecting earning potential, which is a shame. - *Learner, Heart of the South West*

For most participants, however, a loss of earnings was not a substantial concern. Many reported that their employer is flexible and provides paid study leave, whilst others use their annual leave allowance to cover study days at college. Many learn via distance learning, which means that no time off from work is required.

A small number of participants also reported administration fees of approximately £100 payable upon registration; professional membership fees; and exam fees. In addition, some participants are working flexibly and make up their hours at a different point in the week, which does not impact upon earnings but does impact their work/life balance and the amount of time they have to spend with their children.

## Conclusion

The report presents interim findings from the evaluation of the DfE's Cost and Outreach Pilots. Specifically, this report draws on data on learner enrolments to subsidised courses in the first quarter of the academic year, a quantitative survey of learners, and qualitative interviews with learners. Learning from the Cost and Outreach Pilots is intended to inform the development of the National Retraining Scheme (NRS). This section therefore highlights evidence of particular relevance to the design and implementation of the NRS, as well as summarising key messages arising from the evaluation of the pilots.

## Learner numbers and profile

A total of 1,022 enrolments were recorded on subsidised courses up until December 2018 (this may increase by the end of the academic year).

The broad target group for the pilots were adults aged 24+, who are in work and have low to medium skills. Just over three quarters (76%) of learners on subsidised courses were working at the time of enrolment. Nearly three fifths (59.2%) of learners were qualified to Level 2 or 3 before starting their course. Just 6.7 per cent held qualifications at Level 1 or below and 20.9 per cent were qualified at Level 4 or above.<sup>18</sup> Two fifths (40.2%) of learners on subsidised courses were aged 24 to 34 years, with a further third (34.8%) aged 35 to 49. A total of 15.7 per cent of the learners were aged 19-23 and 9.2 per cent were aged 50-64.

It should be noted that only a small proportion of the qualifications eligible for subsidy are currently included in the administrative data. This could either be because providers decided not to offer particular qualifications, because adults did not enrol on them, or because we do not yet have the data on enrolments. This should become clearer when data for the full academic year is available, as well as from wider evaluation activity.

## Learner motivations

The majority (93%) of learners responding to the survey said they took up learning for work or career reasons. They can be classified into two groups: upskillers who want to progress in their current line of work (for example improve in their current role or get a promotion) (65% of learners motivated by work or career reasons); and retrainers who

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<sup>18</sup> 7.4 per cent of learners did not hold any qualifications at the time of enrolment and the qualification level of 5 per cent of learners was unknown.

want to move into a substantially different job (22%).<sup>19</sup> Retrainers were predominantly younger adults wanting to move on from low skilled work, but who lacked visible progression opportunities. Retrainers reported a comparatively high number of barriers to career advancement, including a lack of experience, concerns about childcare and a lack of confidence.

All learners interviewed for the evaluation attributed their participation in the subsidised courses to plans and ambitions regarding their future employment. This included:

- changing the sector or occupation in which they work to establish a new career;
- progressing in their current occupation or profession, either with their existing employer or in a new organisation; and
- progressing to management roles. A number of respondents stated that they were undertaking training in the hope of achieving greater job security, which is particularly relevant to the aims of the NRS.

Triggers to take up learning, described by interviewees, included a change in personal circumstances, such as:

- loss of employment;
- progressing to the next level of qualification; and
- recent promotion at work, whereby the training course was part of their development plan to help them build relevant skills.

The latter suggests that there would be value in considering a place and train model for the NRS, whereby individuals are matched to a job and then receive training to support them to improve their skills.

## **Experiences of outreach and information, advice and guidance**

The survey of learners provides insight on the effectiveness of different referral routes at engaging adults in different circumstances. The greatest differences can be seen across categories of employment status. Employed adults were most likely to have heard about learning opportunities from their employer or a learning provider's website (62%).

Similarly, some learners taking part in interviews said that they heard about training opportunities via their employer. Messages communicated in this way meant that training was implicitly endorsed by the employer and therefore gave additional weight to the

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<sup>19</sup> The remaining respondents were either unemployed at the time of enrolling and motivated to learn to get a job (9%) or indicated they were motivated by something else (5%).

message. Interview evidence also confirmed the importance of outreach being perceived by learners as personally relevant, particularly where messages are linked to individuals' professional development plans and career aspirations.

Learners' testimonies suggested that, in most cases where IAG was experienced, this did not take the form of in-depth advice or guidance. Learners tended to be given practical information about their course and supported with their enrolment. Most individuals had already decided on their course before engaging with IAG. These interactions therefore did not influence respondents' attitudes and behaviours or inform their decision making to take up learning. In retrospect, some learners said that they would have welcomed more substantive IAG.

## **Influence of the subsidised course offer**

Administrative data showed that nearly three quarters of learner enrolments related to courses that are fully subsidised, indicating that the level of subsidy could have influenced learners' choice of course.

Three quarters of survey respondents who were aware of the course fee subsidy suggested that it was a factor in encouraging them to take up the learning opportunity. However, the survey suggested that the subsidy had no behavioural influence for one third of the overall cohort, either because they reported that the subsidy did not encourage them to take up their course or because they were unaware of the subsidy. For those influenced by the subsidy, its effect is not uniform across learners and subsidy levels. Learners on fully subsidised courses were more likely to report a positive influence, compared with those on part subsidised courses.

Half of the learners interviewed said that the subsidy had impacted in some way on their decision to enrol on their course. For many of these learners, the subsidy was the main trigger that tipped the balance in their decision making, and some explained that it would have been impossible for them to enrol without the subsidy due to financial constraints. Some learners' experiences suggest that the subsidy also encouraged employers to be more positive about supporting staff to take up learning opportunities.

Interviewees who said the subsidy had little or no impact on their decision to enrol on their course cited different methods of paying course fees, including their employer paying the fees, a loan or self-funding. Learners said the subsidy had raised the profile of the course in promotional material and therefore brought it to their attention, but the funding itself made no difference to their selection of a course or their decision to enrol.

Administrative data showed that nearly three quarters of learner enrolments to date related to courses that were fully subsidised.

## Other learning-related costs

Some upskillers (28%) who were not enrolled on fully subsidised courses received financial support from their employer to cover remaining fees. However, no retrainers received financial support from their employer. The survey showed that the majority (70%) of learners incurred at least one kind of additional cost, travel costs and the purchase of additional materials being most common.

Wider costs associated with learning cited by learners taking part in interviews included course books, travel, childcare, administrative fees and negative impact on earnings as a result of having to take unpaid leave for their course. In general, the evidence suggests that meeting these additional costs presents a challenge for a small number of respondents due to their personal financial circumstances, but that overall, learners accept these costs and in some cases are able to access other sources of support.

## Implications for the National Retraining Scheme

Findings from the learner survey and learner interviews highlighted the following implications for the National Retraining Scheme (NRS):

- To successfully engage adults seeking to retrain, the NRS will need to address both barriers related to individuals' attitudes towards career learning, as well as more practical barriers related to individuals' personal circumstances.
- The range of career-related motivations cited by learners illustrates the diversity of messages that need to be conveyed as part of any outreach activity for the NRS. These messages will also need to be tailored to ensure they are engaging for the broad target group.
- Learners' positive response to becoming aware of learning opportunities in the workplace emphasises the importance of employer engagement in the NRS – not only to support new recruits but also to communicate messages about the scheme and the offer of training to staff.
- Feedback from some learners that they would have welcomed more substantive IAG highlights the importance of having a more in-depth IAG offer for people who need it. This offer will need to be clearly communicated to ensure individuals are aware of what they can access, how and the benefits of doing so.



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